

Notes

User Needs Management

The User Needs Management (UNM) Assistant provides onscreen instructions for each step of the process of adding to, or removing elements from, a User record or group of User records.

The User Needs Management Assistant is available from the **User Management** menu.



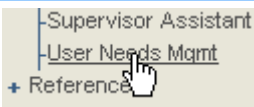
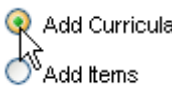

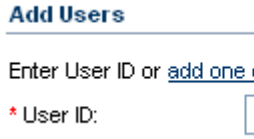
User Needs Management Assistant tasks include **Add Curricula**, **Add Items**, **Add Competency Profiles**, **Add Competencies**, **Add Job-related Curricula**, **Add Job-related Competency Profiles**, **Remove Curricula**, **Remove Items**, **Remove Competency Profiles**, and **Remove Competencies to/from User record(s) with the UNM (User Needs Management) Assistant**.

A Day-in-the-Life Scenario:

It has been decided to assign First Aid and CPR training Items to several AgLearn Security Guards involved in a special AgLearn-hosted event.

Notes

Add Curricula to User Record(s) with the UNM Assistant

Step	Activity	View
1.	Select the User Management menu.	
2.	Select Tools from the left menu.	
3.	Select User Needs Mgmt.	
4.	Click the Add Curricula option button.	
5.	Click Next to move to Step 2.	
6.	Select the Add one or more from list link to search for and enter Users into the UNM Assistant.	 <p>Add Users</p> <p>Enter User ID or add one or more from list.</p> <p>* User ID: <input type="text"/></p>

Notes

Add Curricula to User Record(s) with the UNM Assistant

Step Activity View

7. On the **> Search** screen, enter the appropriate search criteria.
- Note:** See **Managing Data Entry and Searches** for more detailed information on searching.

Search Users

Enter a value for each field that you want to use to filter your search. Some fields allow you to select from a list of values. You can also add or remove search criteria to further refine your search.

Case sensitive search: ☐ Yes ☒ No

User ID:

Last Name:

First Name:

Middle Initial:

User Status: ☒ Active ☐ Not Active ☐ Both

Domains:

8. Click **Search**.

Search

9. On the **Results** tab, select the corresponding **Add** check box for each User to be added.

User ID	User Name	Add
LEARNER04	Learner, Alec	<input checked="" type="checkbox"/>
LEARNER05	Learner, Bill	<input checked="" type="checkbox"/>
LEARNER06	Learner, Charlie	<input checked="" type="checkbox"/>
LEARNER02	Learner, Dashiell	<input type="checkbox"/>

10. Click **Add**.

Add

11. Review the Users in the **Edit Users** section.

Tip: To remove a User, select the corresponding **Remove** check box and click **Apply Changes**.

Edit Users

Apply Changes

Select All / Deselect All

User ID	Name	Remove
LEARNER04	Learner, Alec	<input type="checkbox"/>
LEARNER05	Learner, Bill	<input type="checkbox"/>
LEARNER06	Learner, Charlie	<input type="checkbox"/>

12. Click **Next** to move to Step 3.

Next

13. Select the **Add one or more from list** link to search for and enter Curricula into the UNM Assistant.

Select Curricula for Adding

Enter Curriculum ID or [add one or more from list](#).

* Curriculum ID:

14. On the **> Search** screen, enter the appropriate search criteria.
- Note:** See **Managing Data Entry and Searches** for more detailed information on searching.

Case sensitive search: ☐ Yes ☒ No

Curriculum ID:

Curriculum Title:

Add/Remove Criteria 

15. Click **Search**.

Search

Notes

Add Curricula to User Record(s) with the UNM Assistant

Step Activity View

16. On the **Results** tab, select the corresponding **Add** check box for each curriculum to be added.

Curriculum ID	Curriculum Title	Add
381		<input type="checkbox"/>
AC-TEST CURRICULA	Demo Curricula	<input checked="" type="checkbox"/>
ADMIN-BUDGET	Budget skills	<input type="checkbox"/>

17. Click **Add**.

Add

Note: To remove curricula, select the corresponding Remove check box and click Apply Changes.

18. Review the curricula in the **Edit the List of Curricula for Adding** section.

Edit the List of Curricula for Adding			
			Apply Changes
Select All / Deselect All			
Curriculum	Title	Assign Date	Remove
AC-TEST CURRICULA	Demo Curricula	11/22/2006	<input type="checkbox"/>
AM-RD-Communicating	Communication training for new RD Specialist	11/22/2006	<input type="checkbox"/>

19. Click **Next** to move to Step 4.

Next

Assign dates can be set in the past, but not in the future.

20. For each curriculum listed, click the corresponding **Assign Date** Calendar icon to select and enter an assign date for that curriculum.

Curriculum ID	Title	Assign Date (MM/DD/YYYY)
AC-TEST CURRICULA	Demo Curricula	 11/22/2006
AM-RD-Communicating	Communication training for new RD Specialist	 11/22/2006

Note: The current date is the default date.

21. Click **Next** to move to Step 5.

Next

Jobs that will add multiple curricula to many Learners can place a strain on system resources. Schedule large jobs (>200 records) for times when most users are off the system.

22. Click **Run Job Now** to have AgLearn complete the assignment to User record(s).
- Note:** See **Scheduling Background Jobs** for more detailed information on scheduling jobs.

Run Job Now

23. Review the Status message(s) on the **Finished** screen.

Finished
Status: <ul style="list-style-type: none"> Successfully added the curricula to the specified learners.

Notes

Adding Items to User Record(s) with the UNM Assistant

Step	Activity	View															
1.	Select the User Management menu.																
2.	Select Tools from the left menu.																
3.	Select User Needs Mgmt.																
4.	Click the Add Items option button.																
5.	Click Next to move to Step 2.																
6.	Select the Add one or more from list link to search for and enter Users into the UNM Assistant.	<p>Add Users</p> <p>Enter User ID or add one or more from list.</p> <p>* User ID: <input type="text"/></p>															
7.	On the > Search screen, enter the appropriate search criteria. Note: See Managing Data Entry and Searches for more detailed information on searching.	<p>Case sensitive search: <input type="radio"/> Yes <input checked="" type="radio"/> No</p> <p>User ID: <input type="text"/> Starts With <input type="text"/></p> <p>Last Name: <input type="text"/> Starts With <input type="text"/></p> <p>First Name: <input type="text"/> Starts With <input type="text"/></p> <p>Middle Initial: <input type="text"/> Starts With <input type="text"/></p> <p>User Status: <input checked="" type="radio"/> Active <input type="radio"/> Not Active <input type="radio"/> Both</p> <p>Domains: <input type="text"/> Starts With <input type="text"/> </p>															
8.	Click Search .																
9.	On the Results tab, select the corresponding Add check box for each User to be added.	<table border="1"> <thead> <tr> <th>User ID</th><th>User Name</th><th>Add</th></tr> </thead> <tbody> <tr> <td>LEARNER04</td><td>Learner, Alec</td><td><input checked="" type="checkbox"/></td></tr> <tr> <td>LEARNER05</td><td>Learner, Bill</td><td><input checked="" type="checkbox"/></td></tr> <tr> <td>LEARNER06</td><td>Learner, Charlie</td><td><input checked="" type="checkbox"/></td></tr> <tr> <td>LEARNER02</td><td>Learner, Dashiell</td><td><input type="checkbox"/></td></tr> </tbody> </table>	User ID	User Name	Add	LEARNER04	Learner, Alec	<input checked="" type="checkbox"/>	LEARNER05	Learner, Bill	<input checked="" type="checkbox"/>	LEARNER06	Learner, Charlie	<input checked="" type="checkbox"/>	LEARNER02	Learner, Dashiell	<input type="checkbox"/>
User ID	User Name	Add															
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LEARNER02	Learner, Dashiell	<input type="checkbox"/>															
10.	Click Add .																

Notes

Adding Items to User Record(s) with the UNM Assistant

Step Activity View

11. Review the Users in the **Edit Users** section.

Tip: To remove a User, select the corresponding **Remove** check box and click **Apply Changes**.

Edit Users

Apply Changes

Select All / Deselect All

User ID	Name	Remove
LEARNER04	Learner, Alec	<input type="checkbox"/>
LEARNER05	Learner, Bill	<input type="checkbox"/>
LEARNER06	Learner, Charlie	<input type="checkbox"/>

12. Click **Next** to move to Step 3.

Next

13. Select the **Add one or more from list** link to search for and enter Items into the UNM Assistant.

Select Items for Adding

Enter 'Item ID' and 'Item Type' or [add one or more from list](#).

* Type: 

14. On the **> Search** screen, enter the appropriate search criteria.

Note: See **Managing Data Entry and Searches** for more detailed information on searching.

Case sensitive search:

☐ Yes ☒ No

Item Types:

Starts With 

Item ID:

Starts With

Revision Date:
(MM/DD/YYYY)



Revision Number:

Starts With

Item Title:

Starts With

15. Click **Search**.

Search

16. On the **Results** tab select the corresponding **Add** check box for each Item to be added.

Item	Title	Assign. Type	Add
Classroom THG-MSEXCEL-101 (Rev 7/8/2005 01:06 PM EST)	Basic Excel		<input checked="" type="checkbox"/>
Classroom THG-MSEXCEL-102 (Rev 10/14/2005 03:21 PM EST)	Intermediate Excel		<input checked="" type="checkbox"/>

17. Click **Add**.

Add

18. Review the Items in the **Edit the List of Items for Adding** section.

Tip: To remove Items, select the corresponding **Remove** check box and click **Apply Changes**.

Edit the List of Items for Adding

Apply Changes

Select All / Deselect All

Item	Title	Assign. Type	Assign Date	Remove
Classroom THG-MSEXCEL-101 (Rev 7/8/2005 01:06 PM EST)	Basic Excel		11/22/2006	<input type="checkbox"/>
Classroom THG-MSEXCEL-102 (Rev 10/14/2005 03:21 PM EST)	Intermediate Excel		11/22/2006	<input type="checkbox"/>

19. Click **Next** to move to Step 4.

Next

Notes

Adding Items to User Record(s) with the UNM Assistant

Step Activity View

20. For each Item listed, click the corresponding **Assign Type** to select an assignment type for that Item.

Item	Title	Assign. Type
Classroom TNG-MSEXCEL-101 (Rev 7/8/2005 01:06 PM EST)	Basic Excel	<div> LEG_MAND (Legislatively Mandated) OPT (Optional) REC (Recommended) REQ (Required) </div>

21. Click **Next** to move to Step 5.

Next

22. For each Item listed, click the corresponding **Required Date** Calendar icon to select and enter the date by which the User must complete that Item.

Item	Title	Assign Date	Required Date (MM/DD/YYYY)
Classroom TNG-MSEXCEL-101 (Rev 7/8/2005 01:06 PM EST)	Basic Excel	11/22/2006	<div> 11/29/2006 </div>
Classroom TNG-MSEXCEL-102 (Rev 10/14/2005 03:21 PM EST)	Intermediate Excel	11/22/2006	<div> 11/22/2006 </div>

Jobs that will add multiple items to many Learners can place a strain on system resources. Schedule large jobs (>2000 records) for times when most users are off the system.

23. Click **Run Job Now** to have AgLearn complete the assignment to User record(s).
Note: See **Scheduling Background Jobs** for more detailed information on scheduling jobs.

Run Job Now

24. Review the Status message(s) on the **Finished** screen.

Finished
Status: <ul style="list-style-type: none"> Successfully added the items to the specified learners.

Caution: Do not use the browser's **Back** button when using the UNM Assistant. Use the **Previous** button to move back to previous step(s).